

# Become a Key Contact

**California Dental Association**  
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## What you can do for your profession

Dentistry is one of many legislated professions. Government not only affects you personally, but it also affects how you practice dentistry and how you operate as a small-business person.

You can make a difference. You have the ability to influence legislators and the opinions they have about issues. Armed with the information in this manual and the membership assistance of the public policy department of the California Dental Association, you can exercise your political strength.

As one of the community's respected health care professionals, you are way ahead of the curve. You may already be involved in local business organizations and have met community and state legislative leaders.

This handbook contains practical information so that you can begin your involvement in "grassroots" politics. We hope to provide you with a level of comfort and the tools you need to make a difference for you, your practice and your patients.

## CDA Political Action Network

The California Dental Association represents over 27,000 dentists throughout California. CDA provides legislative advocacy and political action but cannot be successful without the help of dentists in every part of California.

Because state legislators are now limited in the number of terms they can serve, developing the long-term relationships of yesterday is gone. It is essential that CDA have an effective grassroots network of dentists throughout California.

Attorneys, physicians, insurance companies, real estate professionals, teachers, labor unions and nurses, to name a few, have all made commitments to state and local political activity, and we must do the same.

### Organized dentistry must:

- Be a significant part of the political environment in California.
- Help elect public officials who understand the issues important to dentistry.
- Organize grassroots activities to affect the outcome of issues of concern to dentists.

The professional staff of CDA's public policy department (CDA-Public Policy) can provide you with technical guidance and legislative information so that you can develop a successful political action program. But the relationship you develop with your legislators is what really makes the difference.

## How to get started

Your dental practice can be affected by the actions of Congress, your state legislature, city councils and county boards of supervisors. This handbook focuses on working with your members of California's Assembly and Senate. The American Dental Association has a grassroots program to work with Congress, and if the need arises, CDA and your local dental society can assist you in dealing with your local officials on dental-related issues.

You are represented by one assemblymember and one senator, determined by where you live and vote. Contact CDA-Public Policy if you need assistance determining who your representatives are.

When you become involved in grassroots politics, here are some of the activities you can do:

- Introduce yourself to your local legislators and establish an ongoing dialogue and friendship with them.
- Become active in local civic and community organizations.
- Seek a position on your local dental society's legislative committee.
- Become a "key contact" for one of your state legislators.
- Respond to requests for action from CDA-Public Policy regarding pending legislative issues (writing letters and making telephone calls).
- Forward copies of newspaper articles of political and legislative interest to CDA-Public Policy.

## What is the next step?

Become politically active with elected officials and candidates on behalf of dentistry.

Become a contributing member to CDA PAC, the dentist's political action committee.

- Contribute money or make in-kind contributions (nonmonetary) to incumbents and candidates.
- Volunteer to work in elections (host coffees, place yard signs, stuff envelopes, make phone calls on Election Day).
- Attend a fundraiser on behalf of organized dentistry.
- Raise money for elected officials or candidates from members of our dental society.
- Host your own dentists-only event for a legislator or candidate. CDA PAC has a pamphlet on how to hold a fundraiser.
- Invite a legislator for a tour of your dental office.

## Become a legislative chair

The president of your local dental society appoints component legislative chairs. The responsibilities of a local chair include:

### Grassroots activities:

- Establish a local legislative committee to serve as a liaison between CDA-Public Affairs and the component.
- Recruit key contacts for each state legislator within your component's district and provide assistance to the new contact to get them started.
- Assure that all participating dentists are educated on the issues affecting dentistry.
- Schedule and encourage attendance at meet and greets with local legislators.
- Coordinate requests for legislative alert activities from CDA-Public Affairs.
- Arrange meetings with local legislators, encouraging the establishment of a dental advisory panel.
- Develop a relationship with the local legislator's district office staff.
- Report regularly to CDA-Public Affairs any and all contacts with legislators.

### Political/election activities:

- Encourage component participation in CDA PAC.
- Coordinate attendance at legislative fundraisers.
- Host a fundraiser.
- Schedule a dental office tour with a legislator.
- With the assistance of CDA-Public Policy, interview candidates running for Assembly and Senate.
- Participate in campaign work.

## Do I have the time for all of this?

Becoming a member of CDA's political action team should not and will not monopolize your time. You have a practice, patients and family that come first.

You are already involved in grassroots activities if you belong to your community or civic organizations or house of worship. You already follow the news in your community and may know community leaders.

We're just asking you to focus a little more attention on all of these issues, especially those that could affect dentistry. You can take opportunities as they arise to communicate dentistry's message into the community.

CDA has a well-trained and professional government relations staff available to provide you with the information and resources you

may need to make the most efficient and effective use of your time. Hundreds of dentists throughout California have incorporated their grassroots activities into their schedules and are successfully serving dentistry in this very important way.

## What is grassroots politics?

A program designed to influence policymakers through the mobilization of local community support (or opposition) is commonly known as a "grassroots politics."

The program increases the visibility of an issue and educates the public and local legislators of organized dentistry's point of view.

The approach of each grassroots effort varies depending on the issue and the political dynamics. Some campaigns may be very sophisticated and may involve the use of media (newspapers, radio and television) as well as a large number of dentists. Or the campaign may target selected legislators being contacted only by dentists who know them well.

You can increase the effectiveness of your grassroots program in the following areas.

### Learn the issues

The first step to becoming involved in organized dentistry's grassroots program is learning the issues. You will need to be knowledgeable of health care issues in general and dentistry specifically. As a small-business person, you should also be aware of salary and wage issues, taxes and demographics of your area.

The CDA-Public Affairs staff can provide you with information regarding issues that are being debated in the California Legislature and can also provide additional information about the political climate on such issues as managed care reform, licensure and scope of practice.

### Getting to know your elected officials

Establishing a trusting and good working relationship with a legislator does take a little time. The benefits are enormous, however. Very few people really take the time to get to know their elected officials. If you have established yourself as a community leader and a credible source of information on issues related to dentistry, your elected officials will look to you for your opinions.

Begin the process by attending community events and forums and introducing yourself whenever possible. If you support an elected official or a candidate, follow through by volunteering in their campaign, getting involved in such activities as precinct-walking, putting up neighborhood signs, making telephone calls prior to and on election day or making a contribution to the campaign. Write



letters of support directly to the official or candidate or write a letter to the editor of your local newspaper supporting this person. Become a member, if you're not already, of the local chamber of commerce or Rotary Club.

Again, CDA-Public Affairs in Sacramento is available to help you decide which candidates or incumbents you may wish to support and will provide you with assistance in the process of getting to know them.

### Get your message out

You probably already belong to some civic or community organizations. Joining these organizations increases your visibility professionally and also from a political perspective. Along the way, you will develop allies, which will make it easier for you to get the message out about how dentistry fits into the overall health care system.

People will not be aware of your viewpoint on dental health care issues until you provide them with the information.

### How do grassroots programs really work?

Every year, CDA's Council on Legislation develops a legislative program, taking positions on bills, perhaps sponsoring bills and developing strategy. During the legislative session, the Update, a CDA publication, reports the status of bills and usually features articles on particular legislative issues related to dentistry.

During the legislative session, CDA-Public Affairs may issue a legislative alert and request for action. These requests require immediate action and are an essential part of CDA's lobbying effort, and an effective grassroots program can help the legislative program be successful.

- CDA develops the background materials and the message you will need.
- The grassroots coordinator will identify the type of action required (letters, faxes, phone calls, personal meetings) and will identify the targeted legislators.

### Contacting legislators

Here are some helpful hints for setting up a meeting with your legislator.

- If a personal meeting is requested, call the scheduling secretary in the district to schedule an appointment. Legislators are in Sacramento Monday through Thursday during the legislative session and are usually available in their districts every Friday.
- Request to meet with the legislator and identify yourself as a constituent (which means you live and vote in the district). If

you have developed a good relationship with the legislator, a personal meeting will often be possible. Otherwise, ask to meet with the district aide who deals with health care issues.

- Don't give up until you can schedule a meeting. Let them know if there are any legislative time frames they need to be aware of.
- If you are bringing other dentists with you, limit the number in your group. The larger your group, the more likely it will be that you will receive a canned speech from the legislator instead of having a meaningful conversation.
- Know your message, anticipate the legislator's questions and be prepared to answer them. Personalize the issue. How will it impact you and your patients?
- Ensure that you debate the issues, not the person.
- Ensure that you provide time to listen to the legislator. Remain positive and realistic about the issue and the approach. Stay on message.
- Know the legislator's politics. Are they inclined to support your position or oppose it? How did they vote on similar issues?
- Be honest. Credibility leads to trust.
- Keep the relationship going throughout the year with a few phone calls or notes recognizing the legislator for his or her accomplishments.
- Always send a thank you note to the legislator following the meeting. Ensure that you reiterate where you left the issue and be available for any additional questions the legislator may have.

Here are a few things you must always avoid:

- Do not argue with the legislator; it is counterproductive. Speak with confidence and conviction.
- Do not speak disdainfully of politics, politicians or the process. It may not be the perfect system, but we must learn to work in it to the best of our ability.
- Do not participate in a discussion of money (i.e., political contributions) and votes. It is totally inappropriate and illegal.
- Do not answer a question if you are not confident that you know the answer. Let the legislator know that you will get the information as soon as possible and call them back.
- When you are representing the policy of the California Dental Association, you should not make any promises or commitments on issues.

### How to place an effective phone call

Telephone calls can be very effective in letting a legislator know how a specific segment of their district feels about an issue. If the legislator is the author of a bill that affects dentistry, CDA-Public Policy may ask dentists throughout the state to call to let the legislator know how dentistry feels about an issue.



Calls are typically brief and to the point. If you know the legislator personally, ask to speak with them or ask for a return phone call. If you are one of many who have been asked to make a phone call, you may speak with the legislative aide in the office who is responsible for this issue.

Here's what you do:

- Let them know who you are and where you are from. As a voting constituent, you have much more significance to them.
- Let them know exactly why you are calling. Address the issue and/or the bill number and what action you would like the legislator to take.
- Provide a list of others who support the issue and the reasons why the legislator should support it.
- Ask the person you are speaking with whether they need additional information or have any questions.
- Call CDA-Public Affairs staff and let them know how the phone call went and if any follow-up is required.

### **How to write a letter**

If you are asked to write a letter to a legislator to ask for his or her support or opposition on an issue and bill, it is important to make that letter count. Here are some tips:

- Always use the proper salutation. The address information will be provided by CDA-Public Affairs and may be the Capitol office or the district office, depending on the time of year.
- Use your professional letterhead; but if you practice outside the district and live in the district, relay that information in the beginning of the letter.
- Personalize the letter if you know the legislator well.
- Identify the specific issue or bill you are writing about and what action you would like the legislator to take. Explain briefly why they should support or oppose the issue. Keep the letter to one page. CDA-Public Affairs will provide you with talking points, and we recommend that you use them. But more importantly, we recommend that you personalize the issue to let the legislator know how it affects you and your patients.
- Take any opportunity to compliment the staff in the office if you have had any dealings with them. The staff often reads the letters first and this may provide some impetus for them to pass the letter along for the legislator to see.
- Ensure that you speak accurately. Follow the information that CDA-Public Affairs has provided to you.
- Do not reference any attendance at a fundraising event or any financial support you or CDA PAC may have given them. This is not appropriate and is illegal.
- Request a response and thank them for their time.

Here is a sample format for you to follow:

Jane Brown, D.D.S.  
1000 Main Street  
Sacramento, CA 95814  
(916) 555-1212

January 1, 2000

The Honorable James Smith  
State Capitol  
Sacramento, CA 95814

Dear Senator Smith:

I am a dentist who has been practicing in your district for 18 years, and a member of the California Dental Association.

I oppose SB 649, which will put unnecessary restrictions on my ability to provide care to my patients. I spoke with Laura Williams in your office last week about this issue and appreciated the time she took to listen to my point of view.

I respectfully request your "no" vote on this legislation.

Please let me know your position on this legislation and whether you require additional information. Thank you for your time.

Best regards,  
Jane Brown, D.D.S.

### **Thank you letters**

It is important to maintain open communications with your legislator on an ongoing basis. Take the time to send them a letter of recognition when they do something you support. They very seldom receive letters thanking them, and the letter will have substantial impact.

### **Getting others involved**

The more people who are involved in a grassroots network, the more effective it can be. If you are the legislative chair of your local dental society, you need to get people involved.

- Establish a legislative committee in your own dental society of dentists who are interested in politics or legislation.
- Convince your president of the importance of legislation and politics if they are not currently involved. CDA-Public Affairs can provide you with information to make your pitch to the president and to potential members of your committee.
- You should have some knowledge of which colleagues would be interested. Call them personally and ask them to get involved.

- Meet periodically to discuss the current legislative issues and upcoming elections (candidates, fundraising activities, attendance at local events or involvement in specific campaigns).
- Establish a system of communication. There are various ways to do this:
  - o **Internet** - More and more people are connected to the Internet, at home and at work. E-mail is a timely and cost-effective way to maintain lines of communication.
  - o **Fax trees** - Faxes are found in almost every office today. It is another way to keep information moving, quickly and inexpensively.
  - o **Telephone trees** - This system can be used when you want to notify, for example, 100 people in your dental society about an issue. If you develop a telephone tree that can be used over and over again, each member calls no more than three or four other members. You call three people, they call three people, etc.
- Make in-kind contributions – Donate office space, computers, postage, copying, or make your office available after hours for telephone banks.
- Send cards and letters of support to your patients, business associates, family, friends and neighbors.
- Make contributions – Attend local fundraising events.
- Raise money – Reach out to your community asking them for financial support for the candidate.
- Hold a fundraiser. CDA PAC has a brochure on how to hold an event for a candidate.
- Be aware of CDA PAC’s matching funds policy (handout available).

## Political involvement

In an era of term limits, many new legislators are elected every other year. Long-term relationships with legislators are a thing of the past. Candidates now often come from city councils, county governments and the private sector. The nature of campaigns has changed. Knowing elected officials at the local level is very important and getting to know the candidates before they become a part of the Sacramento landscape is critical.

CDA PAC is the political action committee representing dentists in California. Your contribution allows CDA PAC to be in the company of the largest contributors to political campaigns, along with teachers, physicians, attorneys, insurance companies, law enforcement and labor unions. In the future, whether we have campaign finance reform or not, people will continue to organize to exercise their rights of free speech. If they can only give a limited amount directly to a candidate, they will find another legal way to support a candidate by supporting or opposing them through the use of independent expenditures (made on behalf of a candidate but without his or her knowledge).

First and foremost, you should become a member of CDA PAC. There is strength in numbers. The CDA PAC board and executive committee make recommendations and decisions regarding political contributions and have the opportunity to meet with candidates in their district to determine whether they should receive CDA PAC support. The CDA PAC staff provides ongoing political analysis and additional information on the candidates’ viability and chances of success. Once a candidate has been chosen by CDA PAC, there are many ways to provide support:

- Volunteer – Work at campaign headquarters, answer phones, stuff envelopes, walk precincts, volunteer on election day.

## Hosting a fundraiser

There is no more effective way to cement a good relationship with a lawmaker than to participate in their election or reelection campaign. In this era of term limits, the cost of running an Assembly or Senate campaign has become increasingly expensive, at times exceeding \$1 million. Candidates must spend a significant amount of their time fundraising, even after they have been elected. They appreciate and remember those who have helped them in their efforts.

You may choose to hold your fundraiser in any number of venues (your home, a restaurant, a meeting hall). Hosting the event in your home adds a very personal touch and can also save on costs ensuring that most of the money raised goes directly to the candidate’s campaign, where they need it most.

Planning and executing a successful fundraiser is hard work. You must be willing to put in the time and effort needed to make it successful. Before you agree to hold an event, talk with CDA PAC staff to determine your fundraising goal (after expenses). You must feel comfortable that you can meet the candidate’s expectations.

## Legal considerations

If you hold a fundraiser on behalf of a candidate for state office, you must be aware of certain provisions in state election law. CDA PAC support staff in Sacramento can assist you as you plan the event.

- There is no limit to the amount of money you can contribute or raise for a candidate unless it is in support of a special election (outside the normal election cycles), in which case you should consult CDA PAC staff.
- Do not accept cash contributions. Although cash contributions of less than \$100 are legal, it is recommended that you ask your contributors to make their check payable to the candidate’s campaign.



- Your invitation should include a contribution card so that all information required by law (name, address and occupation) will be provided by those making contributions of \$100 or more. CDA PAC staff have sample invitations and will assist you in developing yours.
- Expenses incurred by the host cannot be reimbursed by other people or by CDA PAC – it is illegal to do so. If you have arranged, for instance, for CDA PAC or another dentist to pay for food, beverages or decorations for the event, then they must arrange to pay the vendor directly. CDA PAC reports such expenses as “in-kind contributions” to the candidate.

### Planning the fundraiser

Once you have decided to host a fundraiser, your next step will be to decide what type of event to sponsor. Your primary goal is to raise the largest amount of money for your candidate for the least amount of expense. Hosting a dentists-only event achieves the highest visibility for organized dentistry and is preferable. If, however, this is not financially feasible, you may wish to organize the purchase of a table or two at a local event and coordinate attendance by local dentists and spouses.

In deciding what type of event to sponsor, consult with your candidate’s campaign as well as CDA PAC. The price of the ticket is based on a variety of factors: the size of the event (the larger the event, the smaller the ticket price), the type of event (dinner, cocktails, breakfast) and whether or not the candidate is an incumbent.

### Be organized

The first step in hosting a fundraiser is to let the candidate know you would like to host it. Arrange the event with the candidate, the campaign manager and scheduler.

If you are planning a large event, develop a steering committee to assist in selling tickets.

Develop an agenda for the event and stick to it. Make sure that:

- The candidate has enough time to meet and speak with everyone attending the event. You or a designated person must help the candidate circulate through the crowd and avoid being monopolized by just a few people. You or this designated person can be extremely helpful to the candidate by letting them know who each person is and providing some information about each attendee.
- The candidate has time to address the issues at large and answer any questions.
- You present the checks to the candidate. This is the main reason you have held the event, so make it a show.
- Any campaign literature is distributed or placed on a table accessible to all attendees.

### Sample timeline

#### 7-9 weeks:

Discuss event with CDA PAC.  
Determine date, time, location, ticket price, and fundraising goal.  
Confirm the event in writing with the candidate/staff.

#### 6-8 weeks:

Recruit individuals for the steering committee.  
Draft invitation and ask CDA PAC to review.  
Compile invitation list: past contributors lists of dentists and spouses in component targeted lists from campaign neighbors and friends.

#### 5-7 weeks:

Print invitations.  
Purchase postage.

#### 4-6 weeks:

Mail invitations.  
Conduct steering committee meeting.  
Set up date for phone bank.

#### 3-5 weeks:

Write script for telephone bank.  
Follow up with CDA PAC on progress.  
Evaluate status of ticket sales.

#### 1-4 weeks:

Continue to make follow up calls.  
Confirm event details with candidate.

#### Day of fundraiser:

Check physical arrangements and logistics.  
Set up microphone if needed.  
Have name tags available.  
Have master list of invitees.  
Display candidate’s campaign material.

#### Post fundraising activities:

Mail all checks received late to the candidate’s campaign.  
Follow up on all pledges.  
Send thank you to candidate.  
Send thank you to volunteers.  
Forward list of attendees to CDA PAC and report on event.